

# Road to Christmas Toy Study 2023

🇩🇪 Germany 🇫🇷 France

*From awareness to purchase:  
How your products find their place  
under the Christmas tree*

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### **Was your Christmas communication strategy on point?**

The media landscape is changing dramatically. Were you leveraging the right touch points to reach your target group?



### **Who were your customers this Christmas?**

Parent or child: Who found your products and who decided about the purchase?



### **Did you recruit new users in the Christmas season?**

Did you win new fans with this year's products, or did you "only" activate buyers you had before already?



### **How did your target group buy toys for Christmas?**

Where did they buy and when? Did they wait for special offers or was no promotion needed to persuade them?

*If you are looking for answers to these questions you should take a closer look at our **Road to Christmas Study**.*



Our unique approach:  
We track the purchase  
process for each toy!

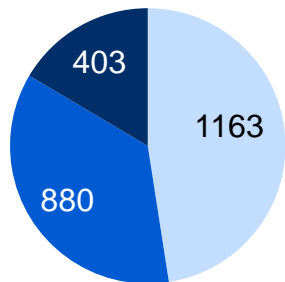
**7315 (!) individual Christmas gifts** were  
coded and analyzed based on detailed  
**open-ended answers** from the consumers.



# Germany: The study reports **more than 3,400 individual toy purchases!**

**2,462** purchase processes among **parents**:

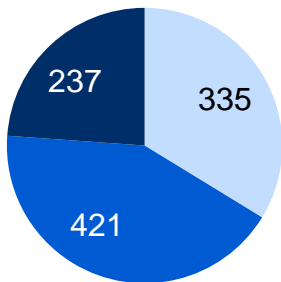
**86 %** of these gifts were bought already!



(2-12 years)

Average toy value:  
51.60 Euro

**993** Christmas wish processes from **children**:

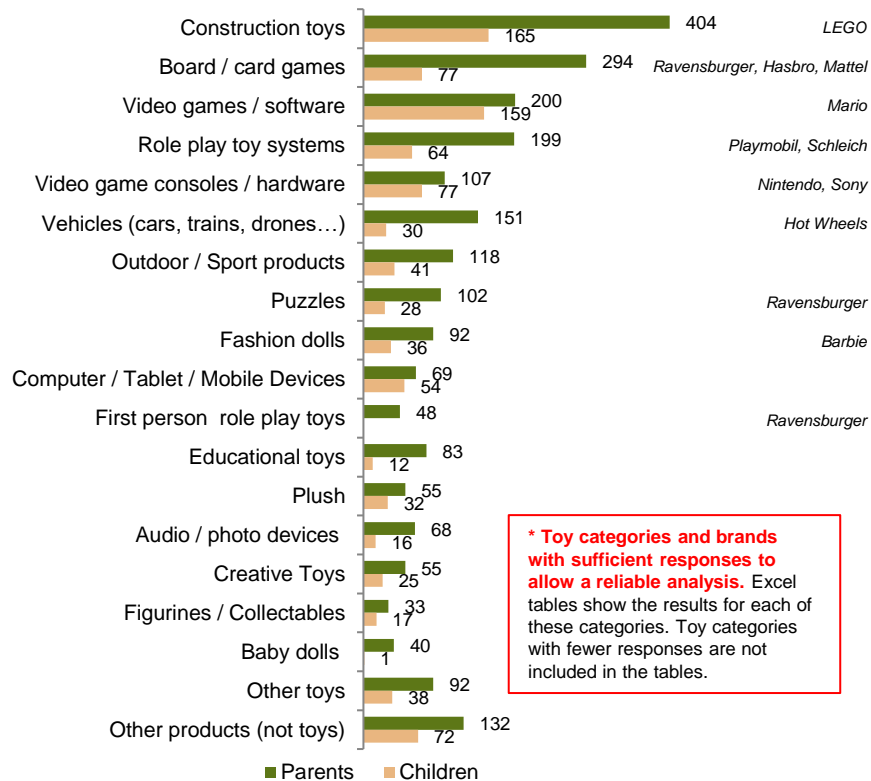


(7-12 years)

Average toy value:  
78.90 Euro

■ < 30 Euro ■ 30-70 Euro ■ > 70 Euro

**3,455** toy purchase journeys on the *Road to Christmas 2023*  
analyzed by the most important **toy categories\*** and **brands\***:



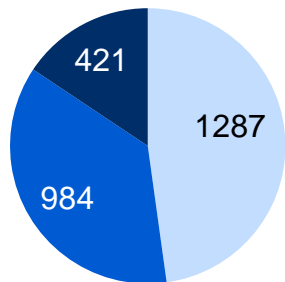
**\* Toy categories and brands with sufficient responses to allow a reliable analysis.** Excel tables show the results for each of these categories. Toy categories with fewer responses are not included in the tables.





# France: Detailed description of **more than 3,800 individual toy purchases!**

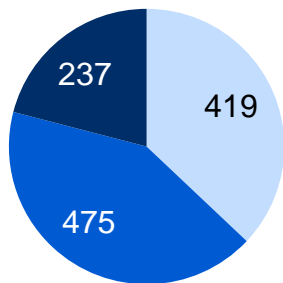
**2,710** purchase processes among **parents**:  
**77 %** of these gifts were bought already!



(2-12 years)

Average toy value:  
87.40 Euro

**1150** Christmas wish processes from **children**:

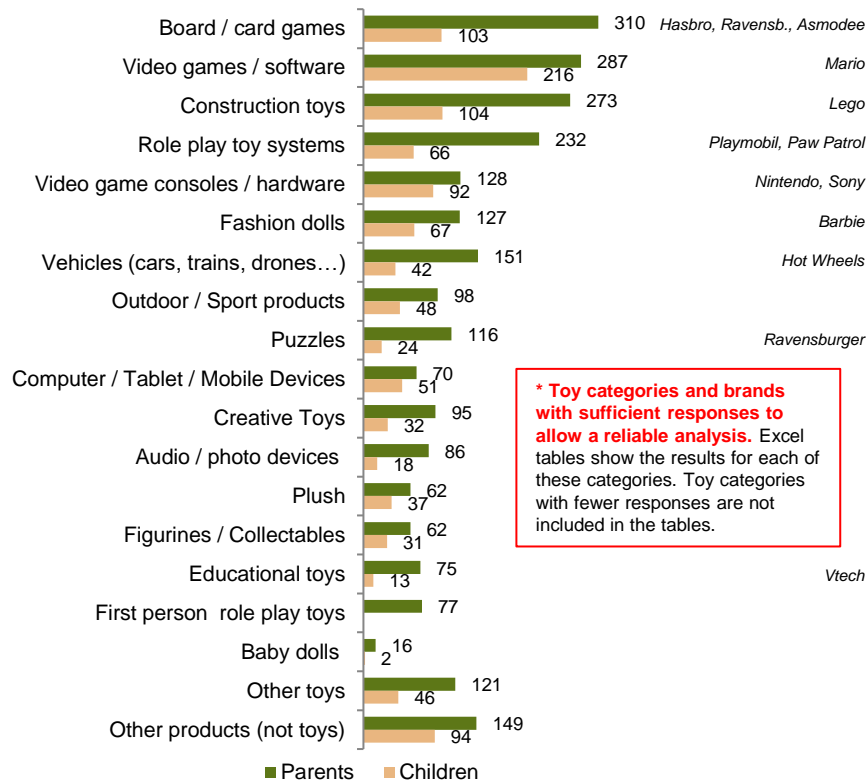


(7-12 years)

Average toy value:  
67.40 Euro




■ < 30 Euro ■ 30-70 Euro ■ > 70 Euro

**3,860** toy purchase journeys on the **Road to Christmas 2023**  
analyzed by the most important **toy categories** and **brands\***:



**\* Toy categories and brands with sufficient responses to allow a reliable analysis.** Excel tables show the results for each of these categories. Toy categories with fewer responses are not included in the tables.

# Study Content: For each toy all stages of the customer journey on the *Road to Christmas*

	Toys that were bought (parent) or are on the wish list	<b>Stage 1:</b> <b>Awareness</b> <i>Inspiration</i> 	<b>Stage 2:</b> <b>Decision making</b> <i>Confirmation</i> 	<b>Stage 3:</b> <b>Purchase</b> <i>Completion</i> 
Parents	<b>For up to 3 toys that were / will be bought (open ended question):</b>			
	<ul style="list-style-type: none"> <li>Toy: Category / Brand / IP (open-ended question)</li> <li>Price that was / will be paid for the product?</li> <li>Toys were assigned to three price categories on the analysis: &lt; € 30 / €30-70 / &gt; € 70</li> </ul>	<ul style="list-style-type: none"> <li>For each of (up to) three toys:                             <ul style="list-style-type: none"> <li>Who gave the idea to buy the toy (was it requested by the child)?</li> <li>Touch point for 1st contact with the toy?</li> <li>When did this happen?</li> <li>Is it the first toy from the brand?</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>For each of (up to) three toys:                             <ul style="list-style-type: none"> <li>Used touch points / sources to collect information about this specific toy?</li> <li>Most relevant / decisive touch point / source for the decision for this toy?</li> </ul> </li> <li>Relevance of touch points / sources to collect information about toys in general                             <ul style="list-style-type: none"> <li>Frequency of usage</li> <li>Impact for the decision making</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>If the (up to three) toys were bought already:                             <ul style="list-style-type: none"> <li>Where was the toy bought?</li> <li>When was the toy bought?</li> <li>Reasons for buying the toy there?</li> </ul> </li> <li>If the (up to three) toys were not bought yet:                             <ul style="list-style-type: none"> <li>Where will the toy be bought?</li> </ul> </li> </ul>
Children aged 7-12 years	<b>For up to 3 toys from the wish list (open ended question):</b>			
	<ul style="list-style-type: none"> <li>Toy: Category / Brand / IP (open-ended question)</li> <li>Price of the toy</li> <li>Toys were assigned to three price categories on the analysis: &lt; € 30 / €30-70 / &gt; € 70</li> </ul>	<ul style="list-style-type: none"> <li>For each of (up to) three toys on the wish list:                             <ul style="list-style-type: none"> <li>Touch point for 1st contact with the toy?</li> <li>When did this happen?</li> <li>Is it the first toy from the brand?</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>For each of (up to) three toys:                             <ul style="list-style-type: none"> <li>Used touch points / sources to collect information about this specific toy?</li> <li>Most relevant / decisive touch point / source for the decision for this toy?</li> </ul> </li> <li>Relevance of touch points / sources to collect information about toys in general                             <ul style="list-style-type: none"> <li>Frequency of usage</li> <li>Impact for the decision making</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Did the child create a wishlist for Christmas?</li> <li>When was the wishlist put together?</li> </ul>

# Road to Christmas Toy Study 2023: The Content

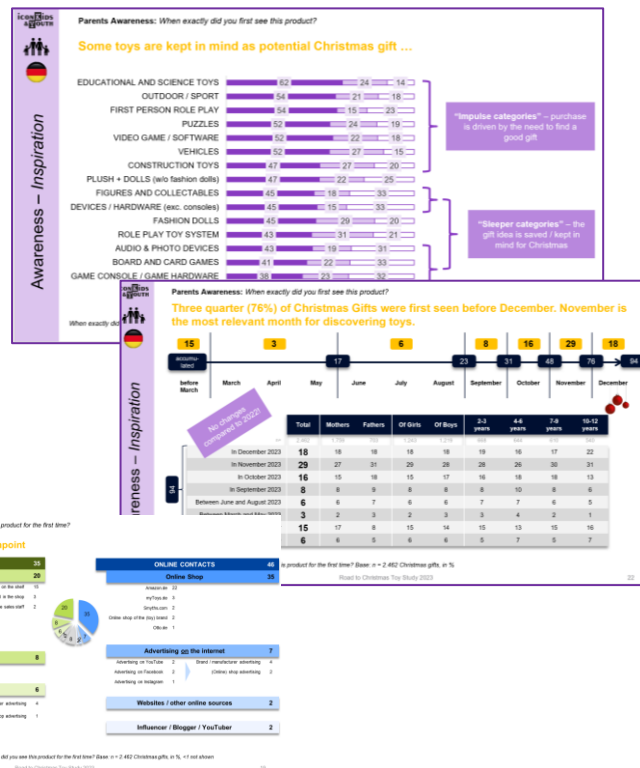
## Awareness: The touch points that inspired Christmas gifting.

### Stage 1: Awareness

- **When** did they see the toy for the first time?
- **Where** did consumers see the toy for the first time?
  - *If seen in advertising:* Who advertised (retail, brand) and where was the advertising seen?
  - *If seen in a store:* How was the product presented?
  - *If seen in a catalogue:* What catalogue (brand, retail)?
  - *If seen on social media:* What platform and what kind of post (friend, blogger, brand ...)?
  - *If seen online:* What website, what kind of content ...?
  - ...
- **Who** discovered the product?

### Separate analysis for parents and children:

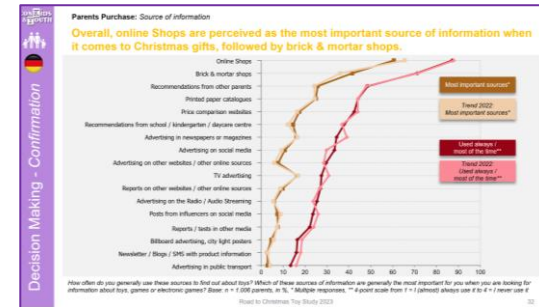
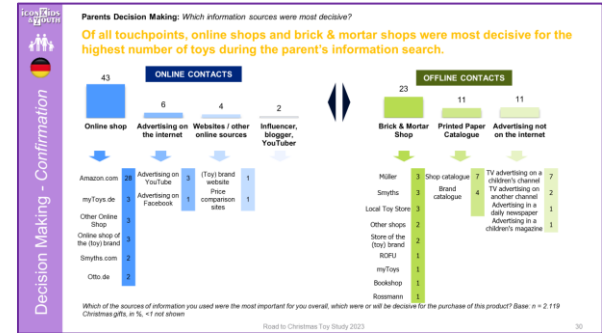
- Slides for
  - Sample total and subgroups based on age & gender of the child
  - Main product categories
- Excel tables with numbers for
  - Price point (low / middle / high)
  - First or repeat purchase
  - Product categories with at least 30 purchases
  - Brands and IPs with at least 30 purchases



**Decision Making:** The sources that **informed and confirmed the purchase decision.**

- **Where else** did consumers look for information about this specific toy? *(Same list as for Stage 1)*
- **Which** information source was **most important / decisive** for this specific purchase decision?
- **Usage** of touch point / information sources **in general**
- **Most important** touch point / information sources **in general**

- Slides for
  - Sample total and subgroups based on age & gender of the child
  - Main product categories
- Excel tables with numbers for
  - Price point (low / middle / high)
  - First or repeat purchase
  - Product categories with at least 30 purchases
  - Brands and IPs with at least 30 purchases





# Road to Christmas Toy Study 2023: The Content

## **Purchase:** How, where and when the **toys are bought**.

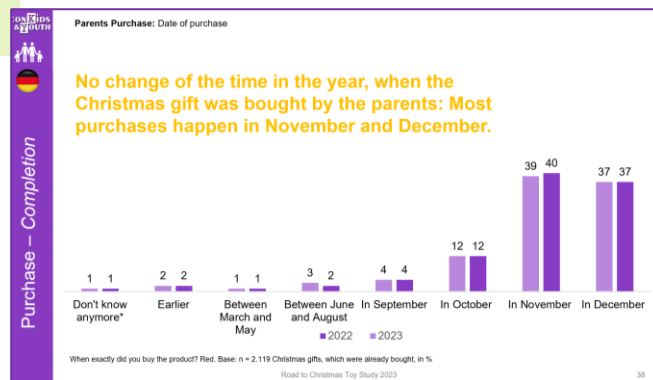
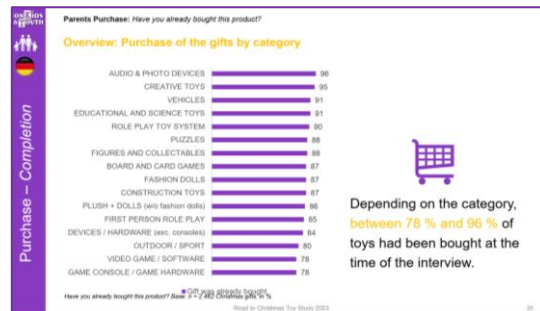
### Stage 3: Purchase

**(NB: Parents only!)**

- **Where** was the specific toy bought / where will it be bought?  
*(Detailed list of online and brick & mortar stores)*
- **Why** was the toy bought in that store?  
*(Detailed list of purchase drivers, including promotions such as Black Friday)*
- *If purchased already at the time of research (in 2023 86 % in Germany and 77 % in France!): When exactly before Christmas was the toy bought?*

### Analysis for parents:

- Slides for
  - Sample total and subgroups based on age & gender of the child
  - Main product categories
- Excel tables with numbers for
  - Price point (low / middle / high)
  - First or repeat purchase
  - Product categories with at least 30 purchases
  - Brands and IPs with at least 30 purchases



# The **Center Piece** of the Analysis: This is what you get

We will show you the **impact of each Touch Point** for your category - and even for your brand!

1 Offline Advertising (TV, print, ...)

2 Catalogues

3 Brick and mortar stores

4 Influencer, YouTuber, blogger

5 Online shops

6 Online advertising

7 Reports / tests

8 Personal recommendation

**Included:** Analysis and graphs for all questions in the PowerPoint report will be differentiated by:

- **Age** of the child
- **Gender** of the child
- **Trend Comparison to 2022 for Germany** (total)

+

**Included:** Excel Tables will be differentiated also by:

- **Price points**
- **First purchase** of the brand (= did the touch point win new customers) vs. **repeated purchase** (= did it build brand loyalty?)
- Main **toy categories** (see page 5)
- Most mentioned **toy brands and IPs**, i.e. separate columns for all brands that were bought by at least n = 30 respondents in the total sample

**On request:** We prepare **customized reports** for your ...

- **Category** – with focus on your brand and close competition
  - **Brand**
  - **Product**
- Base must be at least n = 30







# The Proposal

Study factsheet,  
costs and timing



# Study Factsheet

<b>Markets:</b>	France & Germany
<b>Methodology:</b>	Quantitative online survey Fieldwork: December 14-23, 2023 <ul style="list-style-type: none"><li>• <b>Age 2 – 6 years:</b> Only the <b>parent</b> was interviewed</li><li>• <b>Age 7 – 12 years:</b> Both <b>parent</b> and <b>child</b> were interviewed (parent first, child second)</li></ul>
<b>Sample:</b>	 <b>n = 1006 parents</b> of children aged 2 – 12 years <b>n = 478 children</b> aged 7 – 12 years  <b>n = 1063 parents</b> of children aged 2 – 12 years and <b>n = 536 children</b> aged 7 – 12 years <i>Online representative, quota are set on age &amp; gender of the child, regional spread, social grade)</i>
<b>Questionnaire:</b>	Standardized questionnaire, mobile-friendly
<b>Reporting:</b>	PowerPoint report Excel tables Presentation on request



# The Proposal – Costs and Timing

## Costs:

### Reports per market:

**Study Report:** € 4,000.--

*Includes full PowerPoint report and complete Excel tables*

**Customized report for your brand / category:** € 1,500.--

*Only in combination with purchase of the study report*

**Customized online presentation:** € 800.--

*Only in combination with purchase of the study report*

Please note that the copyright of the study remains with iconkids & youth. The sharing of results (also in excerpts) is only permitted in consultation with iconkids & youth.

Costs excl. 19% VAT. Costs are due within 10 days after ordering the study without any deduction for whatever reason. The General Terms and Conditions (AGB) of iconkids & youth international research apply. Any change of conditions is only possible with the of iconkids & youth.







How else can we help you **achieve your goals** in the toy market?

iconkids & youth **specializes in young target groups**, not in individual methods or markets. Benefit from our broad expertise:

- 1 We select the **best possible method** for your research questions and not the one that is particularly popular at the moment.
- 2 Our **analyses** are based on our **unique knowledge** of young target groups and markets. We look outside your box to provide you with the best possible advice for your decisions.



Find out more about **our work** on the following pages!



# In case you have other questions: **WHAT** we do and **HOW** we do it at iconkids & youth

## Foundational research as basis for your market success

 <b>Consumer Insights</b>	 <b>Shopper Insights</b>	 <b>Quantitative Tracking Studies</b>
<p><b>Research Objectives:</b></p> <ul style="list-style-type: none"> <li>• Explore the <b>relationships, attitudes and needs</b> of consumers regarding your product category</li> <li>• Understand better the <b>usage of your products</b> in the context of everyday-life</li> <li>• Identify <b>relevant product needs</b> or market gaps for new products</li> </ul>	<p><b>Research Objectives:</b></p> <ul style="list-style-type: none"> <li>• Understand the dynamics and interactions during the <b>purchase process</b> at home and in front of the shelf</li> <li>• Identify accepted <b>price levels</b> and <b>price barriers</b></li> <li>• Learn from the <b>competitors</b> and their products</li> <li>• Evaluation of <b>packaging designs</b> and <b>POS promotions</b></li> <li>• Check of the <b>range composition</b></li> </ul>	<p><b>Research Objectives:</b></p> <ul style="list-style-type: none"> <li>• Provide data about <b>product and brand awareness / usership</b> vs. the competition</li> <li>• <b>Customer segmentations</b> and <b>persona quantification</b></li> <li>• <b>Communication:</b> Measuring of the <b>advertising impact</b></li> <li>• Tracking of <b>brand perception</b> and <b>brand engagement</b></li> </ul>
<p><b>Preferred Methodologies:</b></p> <ul style="list-style-type: none"> <li>• <b>Online diary studies</b> to record the consumer behavior over a given time period</li> <li>• <b>In-home interviews</b> to get insights in the real-life product usage situation</li> <li>• <b>Immersive ethnographies research</b> as deep dive into the consumers life</li> <li>• <b>Focus groups</b> for an intensive exchange between consumers</li> <li>• <b>In-depth interviews</b> to explore deeply attitudes, motives and values of the individual consumers.</li> </ul>	<p><b>Preferred Methodologies:</b></p> <ul style="list-style-type: none"> <li>• <b>Accompanied Shop-alongs</b> in relevant stores with children and / or parents (individual interviews, pairs)</li> <li>• <b>Accompanied Online-shopping</b></li> <li>• <b>Shopping diaries</b> with WhatsApp or designated online research platforms.</li> </ul>	<p><b>Preferred Methodologies:</b></p> <ul style="list-style-type: none"> <li>• <b>Online survey</b> – sample size and structure adapted to your needs</li> <li>• <b>Face-to-face survey</b> with full representativity for Germany – also as cost-effective multi client survey!</li> </ul>

# In case you have other questions: **WHAT** we do and **HOW** we do it at iconkids & youth

Research to prepare, validate and fine-tune your initiatives: Product, communication & advertising, packaging, promotion ...



## Idea & Concept Development (no material required!)

### Research Objectives:

- Create a **basic understanding of the consumers' needs & wants**
- **Generate as many ideas as possible ideas** to fuel the development of new products, new communication, new packaging designs ...
- **First selection of ideas** which promise the most potential in the market

### Preferred Methodologies:

- **Co-Creation Workshops** with client and consumers
- **Creativity workshops with consumers** (children age 8+ years)
- **Client workshops**



## Concept Validation & Selection

(material: scribbles, story or mood boards, prototypes or mock-ups ...)

### Research Objectives:

- Explore the **appeal** of the concepts
- Understand **strengths and weakness of the concepts** from the consumers' perspective
- Check for **brand fit**
- **Identify the most promising concepts** to be taken to the next stages of the development process
- Derive **suggestions for improvement** or changes
- Evaluate the **potential for success** vs. the competition

### Preferred Methodologies:

- **Focus groups** with consumers (parents, children aged 8+ years)
- **Mini-groups with children** (age 4+ years)
- **Friendship-pair interviews** with children (age 4+ years)
- **Parent-child pair interviews** (age 3+ years)



## Concept Decision

(material: close to final prototypes, dummies, mock-ups, product visuals, videos ...)

### Research Objectives:

- Measure the **market potential** vs the competition (purchase simulation!)
- Check the **correct understanding** of benefits & values
- Fine-tune **key drivers & messages for communication**
- **Brand fit**
- **Specify the reachable target group** (age, gender) – sweet-spot and extended target group
- Validate the **price points**
- Disaster check of the **execution**

### Preferred Methodologies:

- **Quantitative ad-hoc Online study**
  - **Quantitative face-to-face hall test / central location interviews**
- NB: We recommend implementing a quant study for most reliability. Should this not be possible, the methodologies for Concept Selection & Validation can be considered.*

# Project Team & Toy Experience

The project will be managed by **Axel Dammler** and **Nilufar Amberger**



**Axel Dammler | Managing Director**

Axel is a leading expert for the German toys market. He is jury member for the Toy Award and member of the Trend Committee for the Nuremberg Toy Fair and regular speaker at toy events and publisher of articles about the toys market. He counts most major toy manufacturers as his clients.

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Phone: +49 (89) 544629-33



**Nilufar Amberger | Senior Project Manager**

Nilufar started her career at iconkids & youth right after university. Over the course of 5 years, she gathered extensive experience in consumer and media research. Since September 2022 she is back with iconkids & youth.

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